

# INTERLIBRARY LOAN REIMBURSEMENT — TERMS OF AGREEMENT

FY24 (JULY 1, 2023 - JUNE 30, 2024)



According to the **ENRICH IOWA AGREEMENT** made by and between the State Library of Iowa, and the Participating Library, hereafter referred to as the Participant, in accordance with the terms and conditions set forth below effective **July 1, 2023 - June 30, 2024**, it is mutually understood and agreed:

## 1. PURPOSE

The purpose of the Interlibrary Loan Reimbursement Program is to provide Iowans with equal access to library resources by encouraging and supporting interlibrary loan among all types of libraries. The Interlibrary Loan Reimbursement Program is funded as part of the Enrich Iowa program to subsidize participating libraries for each interlibrary loan made to an eligible Iowa library.

## 2. DEFINITION

**Interlibrary Loan (ILL):** An Interlibrary Loan is a transaction of library materials, or copies of the materials, received or loaned by one autonomous library from another upon request. The libraries involved in interlibrary loans are not under the same library administration. Definition is taken from the Institute of Museum and Library Services.

## 3. GENERAL PROVISIONS:

- A. Libraries must return the completed **ENRICH IOWA AGREEMENT** indicating, in the box provided, that the library wishes to participate in Interlibrary Loan Reimbursement. It must be signed by the library director or other signatory authority, and received at the State Library, Des Moines office on or before **April 30, 2023**.
- B. Participant agrees to loan as well as borrow.
- C. Participant as Lender is not obligated to fill requests for newly published materials or items costing less than \$10.00. Participant as borrower should consider purchasing these types of materials before requesting a loan.
- D. School or academic participants that close before June 30 should submit claims before the end of the school year. Late claims may not be approved for payment.
- E. Participant is reimbursed annually for each item loaned to eligible libraries. Reimbursement is based on transactions from the previous fiscal year. (See Reporting in Section 5D).
- F. Providing interlibrary loan services to nonresidents (i.e., Open Access customers) is a local library option.
- G. Participant as borrower may charge library customers up to \$3.00 per item to offset postage
- H. The Interlibrary Loan Reimbursement program will not provide reimbursement:
  - For bulk loans of a collection of different titles, e.g. a large print collection
  - For lost or damaged materials
  - For postage to send or return ILL items
  - For eBooks and similar electronic downloadable items through Bridges Advantage + or similar resource sharing systems
  - To state agency libraries for loans made to other libraries
  - To AEA media centers for loans made to school libraries
  - To Regents university libraries for loans made to other Regent university libraries

- To special libraries for loans made to other special libraries
  - For loans that are reimbursed under other contracts or agreements
  - For loans to a resident of a city with a library that owns the item
- J. Participant receives reimbursement for items loaned to Iowa libraries of the following types:
- AEA media centers
  - College, community college, and university libraries
  - Public libraries
  - School libraries
  - State-run institution libraries
  - State agency libraries

#### 4. RESPONSIBILITIES OF THE PARTICIPANT AS BORROWING LIBRARY:

- A. Verify citation and identify libraries that own the requested material. Check and adhere to the policies of the lending library.
- B. Send the request using SILO ILL system, OCLC Resource Sharing, other electronic networks, mail, e-mail or fax.
- C. Send requests, unless covered by other agreements, first to like-type, like-sized, and nearest libraries. Regent university libraries are libraries of last resort, and shall be accessed only when all other resources have been exhausted.

#### 5. RESPONSIBILITIES OF THE PARTICIPANT AS LENDING LIBRARY:

- A. Honor ILL requests from all participating Iowa libraries.
- B. Do not charge Iowa borrowing libraries for interlibrary loan.
- C. Follow its own policy regarding charges to the borrowing library for faxes and for materials lost or damaged during the interlibrary loan process.
- D. Report interlibrary loan activity in accordance with the following:
- Report eligible interlibrary loan transactions annually in accordance with directions and deadlines established by the State Library.
  - Submit the Interlibrary Loan Reimbursement Report form and Transaction Log (if applicable) to the State Library by July 31, 2023. *No report is necessary if all interlibrary loans transactions were made through OCLC or SILO.* Provide additional information for reporting purposes as requested by the State Library.
  - If a loan was not made through SILO or OCLC, provide verification, along with the report, that it was made in response to a specific request for the item from another library. Verification may be in the form of photocopies of requests or a log listing the transaction.
  - Report a photocopy of an article as one transaction regardless of the number of pages photocopied.
  - Report *each* copy of the same title loaned for book discussions as one transaction unless you are sending a set intended to check out as a single item. For example, ten copies loaned for book discussions would count as ten transactions.
  - Items packaged together as a unit and checked out as a unit, are counted as one transaction. For example, ten copies of a book grouped together as a set and checked out as a single item would count as a one transaction.
  - Libraries that are part of a shared automation system must provide documentation that interlibrary loans reported for reimbursement were checked out by a resident of a city other than their own.

## 6. RESPONSIBILITIES OF THE STATE LIBRARY:

- A. Administer the Interlibrary Loan Reimbursement program on behalf of participating Iowa libraries and distribute Interlibrary Loan Reimbursement contingent upon receipt of funds.
- B. Post a copy of the Interlibrary Loan Reimbursement Report form and the Transaction Log on the State Library's website.
- C. Reimburse participants annually for each item loaned to eligible libraries.
- D. Reimbursement is based on transactions from the previous year. FY24 Reimbursement is based on the funds available and the total number of transactions for FY23.
- E. Inform libraries as to the availability of funds under Interlibrary Loan Reimbursement and answer questions on the details of Interlibrary Loan Reimbursement. Changes to Interlibrary Loan Reimbursement will be communicated in a timely manner to all participants and other interested parties.
- F. Monitor compliance with the Interlibrary Loan Reimbursement terms of agreement. Audit reports as needed to ensure compliance, and take appropriate action if a participant is not honoring the terms of this agreement.